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Military Market

MAGAZINE FOR THE MILITARY RETAIL SYSTEM

ARMY TIMES PUBLISHING COMPANY

1985 \$5.00

To Market! To Market! New Marketing Confidence at AAFES



MMMD20814 03873 06 C 01
CONG INFO SVC-STAT REF
KEVIN KENDRICK
4520 E WEST HWY-#800
BETHESDA MD 20814

...s staff, marketing director Ron Wauff gives a thumbs up to the retail gains...



Market Reports

Health & Beauty Aids: How Do O-T-Cs
And, Yee, Get Ready for Christmas

The Costs (Real and Hidden) of
Doing Business with the Military

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JUNE 1986

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serving the military resale system

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MILITARY MARKET, (USPS 911-580):

Published 12 times a year by the Army Times Publishing Co., a division of The Times Journal Co., Springfield, Va. 22159-0210. Single copies: \$4; except January Buyers Guide, July Almanac & Directory: \$10 each. Subscriptions: 1 year, \$35 (outside U.S., \$45.); 2 years, \$60 (outside U.S., \$75); 1 year, outside U.S. via airmail, \$180. Second class postage paid at Springfield, Va. and additional mailing offices. **POSTMASTER:** Send address changes to Military Market Magazine, Springfield, Va. 22159-0210.

TSA asked to drop minimum for clubs

The Army Troop Support Agency will be asked to drop the \$500 minimum purchase requirement put on charge purchases from commissaries by post non-appropriated fund activities.

The proposal is one of several Gen. John A. Wickham, Army chief of staff, has presented to Army theater commanders in an effort to aid NAF activities, such as officer and NCO clubs which now face financial problems.

TSA put the \$500 minimum restriction into effect in August, 1985, as a way to reduce paperwork costs resulting from numerous NAF charges.

But a Department of Defense official, who asked not to be identified, said that the limit was invoked because TSA had problems collecting funds from some NAF operations.

Wickham has asked theater commanders to respond to the proposals, including one that calls for lifting the minimum charge restriction.

Maj. Gen. Robert M. Joyce, commanding general of the Army's Community and Family Support Center, told **MILITARY MARKET** in a recent interview that several individual base commanders have commented on the proposal.

Joyce is acting as liaison between theater commanders and Wickham. He said no theater commanders have yet responded.

Some individual base commanders are concerned that lifting the restriction will only create more of a paperwork inconvenience than it would benefit NAF operations.

Joyce told **MILITARY MARKET** that no direct monetary savings would occur for the clubs themselves, if the limit were reduced or eliminated.

"It appears the bottom line is a trade off in administrative costs between the seller and the buyer. In this case, the seller [Army commissaries] has shifted the administrative costs associated with paying cash for small purchases to the buyer [clubs]," Joyce said.

A formal request to change the restriction limit is expected to be sent to TSA shortly, Joyce said.

The actual amount of purchases made at commissaries by clubs and other NAF activities depends on the size of the store, the activity and their location, Joyce said.



Ready to Shop

MSgt. Wayne Selfridge and his wife Elaine cut the ribbon for the new commissary at Loring AFB, Maine. Sgt. Selfridge is the Senior NCO of the Year for 1985. Looking on (LEFT to RIGHT): Richard Theriault, commissary officer, Col. John T. Shepherd, commander, 42nd Bomb Wing, Randy Epps, store manager, Maj. Gen. M. Gary Alkire, AF-COMS commander, and Col. Johnnie L. Vaught.

Expanded hours make only slight impact on commissary sales

Expanded hours of operation at Air Force commissaries have resulted in sales increases of over 2 percent. But similarly expanded hours at Army and Navy stores have shown negligible changes, according to agency spokespeople.

Sales climbed 2.48 percent during the June-October period in 1985 at nine ConUS AF-COMS stores that increased their hours, according to an Air Force Commissary Service official.

The additional hours increased the number of customer transactions by 3.35 percent.

Sales at the nine ConUS stores that began Sunday operations increased by 3.06 percent during the same period. Customer count increased 9.6 percent.

The stores that did not increase their hours reported a slight decrease in sales of 0.03 percent.

AF-COMS' Wee Serv stores also experienced similar sales and transaction growth, but figures were not available. Wee Servs are located at Maxwell AFB, Ala., Lowry AFB, Colo., and Wright-Patterson AFB, Ohio.

At the Troop Support Agency, hours were expanded in 22 Army stores worldwide last year, according to Bob Hunt, agency spokesman. TSA added a total of 152 hours to those stores, but neither sales nor customer transactions increased.

Hunt said sales may not have increased because patrons are only shopping at different hours and not necessarily purchasing more.

A spokeswoman for NAVRESSO said that the Navy increased hours at eight stores by a total of 18½ hours in 1985. She said the increase in hours had a slight impact on sales and customer flow. Figures are not available.

Do the hours make a difference?

	Total Increased Hours	Stores With Increased Hours	Percentage Of Increased Sales	Percentage Increase In Patron Count
AF-COMS *	n/a	9	2.48	3.35
TSA **	152	22	n/a	n/a
NAVRESSO **	18.5	8	n/a	n/a

* Sales from June to October, 1985.

** Sales for fiscal 1985.

Do Sunday hours make a difference?

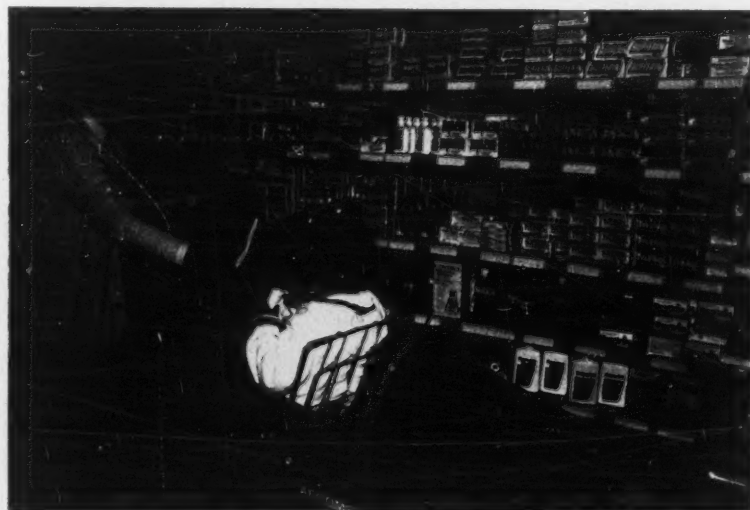
	Stores Open Sundays (June-Oct. 1985)	Percent Sales Increase For Sunday Openings	Percentage Increase In Patron Count
AF-COMS	9	3.06	9.6

market report

R_x Goes Over the Counter

From behind the counter to over the counter, drugs like ibuprofen have a loyal following, pushing the self-treatment trend right up to the sales register.

Markets for cold and allergy remedies, vitamins, hair care, show signs of health. Ethnic H&BA is active, diverse. And will the military man accept male skin care?



By ANNE ROKETENETZ
Associate Editor

THE SELF-TREATMENT trend is growing as prescription drugs move from behind the counter and onto the over-the-counter drug market.

Manufacturers of o-t-c health aids are taking advantage of the Food and Drug Administration's delisting of prescription drugs by recognizing that sometimes consumer loyalty to a product is strong enough to follow it almost anywhere.

"We are a pill-popping generation," one market insider told MILITARY MARKET.

Mass media advertising of o-t-c health products has aided in promoting this self-treatment mode of thinking, he said. "You always see people popping pills on television. We think it's OK."

The fact that many products are going non-prescription "gives more cause for a consumer to latch onto a product" that contains a drug once available by prescription only, said Steve Mitchem, military sales manager for A.H. Robins.

"Anytime you 'consumerize' a product through the media, you get more people trying that product," he said.

Undoubtedly, the most popular and best selling products in this market are the ibuprofen-based analgesics Advil, manufactured by American Home Products, and Nuprin, made by Bristol-Myers.

Ibuprofen was available only by prescription until a little more than a year ago. Today, these two analgesics have taken a bite from the traditional aspirin and nonaspirin pain reliever segment, according to market observers.

According to trade press reports, sales figures show ibuprofen gained 9 percent of the \$1.7 billion pain reliever market since its introduction.

Though that gain is considered good for a new product, some analysts anticipated more. Still others estimated ibuprofen-based pain relievers would gain as much as 15 to 20 percent of the market in their first year.

Advertising Age reports that Advil leads Nuprin in market shares, 6 per-

BY KATE PATTERSON



NO, THAT'S NOT CAMOUFLAGE: Will men's skin care catch on in the barracks?

Skin Care: Will Military Men Go for It?

Even as industry insiders point to tremendous growth in the men's skin care segment of the H&BA market, observers of the military market say the trend hasn't really caught on in the barracks.

According to *Advertising Age*, the men's skin care segment jumped 15 percent in 1984.

In the skin care category, the best sellers appear to be skin bronzers, wrinkle removers, eye creams and facial scrubs and masques. Moisturizers and beard softeners are also hot ticket items.

Jan Stuart is a manufacturer of men's skin care products that would like to get into the military, according to Fred Jagodzinski, the company's divisional marketing director.

From the Jan Stuart line, men can purchase a skin care program — for their skin type — that includes a shaving/cleansing creme, aftershave/astringent, day moisturizer, a night creme/beard softener and a facial masque or scrub.

The company also has a similar line that will work on any type of skin.

Jagodzinski told *MILITARY MARKET* that it is important that these skin care products are not considered cosmetics. "Cosmetic is a taboo word in this industry. We don't want the men to feel they are wearing makeup."

One leading line of men's skin care products, available in some West Coast Navy exchanges, is Interface. The California-based company promotes its four step skin care program as "the framework for a successful face."

A company spokeswoman said Interface has been shipping into exchanges for about a year.

NAVRESSO's H&BA buyer, Glen Hoffman, confirmed that Interface is available in a limited number of West Coast exchanges. But, he said, the products aren't really selling well. "It's been nice, but it's been no big deal."

There's one thing that has changed in the business of men's skin care items and colognes, say industry observers. Men — not girlfriends or wives — are now doing most of the buying. — A.R.

cent to 2.5 percent. Those figures will undoubtedly change when the two manufacturers lose their exclusive U.S. marketing rights this summer.

Despite the entry of ibuprofen into the o-t-c market, Glen Hoffman, H&BA buyer for NAVRESSO, told *MILITARY MARKET* the \$100 million dollar analgesic segment is still flat.

Hoffman attributes some of this to the declining sales Johnson & Johnson has faced with its Tylenol brand. Sales declined — although the company will not indicate by how much — after several people died from taking cyanide-tainted capsules. "This has thrown a monkey wrench into sales," said Hoffman.

While it has been proven that the deadly poison was added to Tylenol bottles after manufacture, J&J has pulled its capsule version of Tylenol from the market and is replacing it with caplets to regain customers. Though the medication has always been available in caplets, Hoffman said, the company will have to do some fairly heavy promotion to get former capsule users to turn to caplets.

Gesundheit for Colds, Allergies

One segment of the market that has very healthy signs is cold and allergy remedies. The growth is coming from prescription to o-t-c switches. Sales figures for 1985 show a growth of 12 percent over '84.

A.H. Robins' Dimetapp, a prescription drug that went o-t-c last June, is doing very well, for example. It has already captured 7½ percent of the market, said MSM Mitchem.

"Dimetapp is the No. 1 cold and allergy medication in drug stores and the No. 2 seller in food and drug stores combined," Mitchem boasts.

The No. 1 product in the cold and allergy segment is Actifed, manufactured by Burroughs Wellcome Co., and introduced to the o-t-c market three years ago. Actifed carries an 8 percent market share in sales in food and drug stores combined.

"Because of loyal prescription users, these items are perceived from an efficacious standpoint as being stronger than any of the other brands already out there," Mitchem said.

Besides being a former prescription drug, Mitchem also says Dimetapp's quick success came from a "record flu and cold year."

PHOTOS BY TRACY WOODWARD

market report

Sales of Health & Beauty Aids, Cosmetics and Fragrances By Military Exchanges in 1985

Department	United States	Overseas	Worldwide
Health & Beauty Aids	\$201,263,900	\$ 83,163,900	\$284,427,800
Cosmetics & Fragrances	\$ 84,865,000	\$ 30,459,500	\$115,324,500



The record cold year also boosted sales of the company's Robitussin brand cough expectorant by 8 percent over last year. Still, the \$370 million market overall is flat, he said.

Calcium: The Latest Awareness

On the vitamin shelf, price still remains the major factor in sales, said buyers MILITARY MARKET interviewed.

Although A.H. Robins markets only four types of vitamins — three B-complex brands and one zinc brand — said Mitchem, he sees more consumers reading labels and reaching for the private labels and generics.

"The military [especially] devotes much more shelf space to vitamins than do civilian retail stores," he said, adding that the military tends to be more health conscious.

The latest trend in vitamins is calcium and calcium-based supplements. Manufacturers are spending big bucks to educate the consumer on the benefits of calcium in preventing weak bones in older women.

"Manufacturers have done a great job of educating consumers in this area," said Mitchem.

According to NAVRESSO's Hoffman, the calcium trend has hit the market even harder than the zinc fad of several years ago.

Sales figures for the entire vitamin market have shown calcium sales to have jumped 50 percent in the past several years, according to trade press reports.

Home Testers and Kits

A relatively new segment within the o-t-c market to watch are early detection home health tests for pregnancy and other conditions.

According to both Hoffman and

AAFES H&BA buyer Steve Kimple, home pregnancy tests and kits to detect colon cancer are growing in popularity.

"The biggest item [for AAFES] has been the blood pressure kits," said Kimple.

"There are other products of this nature coming down the line as o-t-c diagnostic tools for customers," NAVRESSO's Hoffman told MILITARY MARKET. "It is a category that's starting to grow and could become as large as \$100 million over the next five years," he estimated.

Other o-t-c areas where consumer education is beginning to pay off for o-t-c manufacturers include menstrual pain and stress relievers. With the recognition of premenstrual syndrome (PMS), market shares have grown from 5 percent of the pain reliever market in 1983 to about 20 percent now, *Advertising Age* reports.

Touting Tartar Fighters

There's really not anything new in the toothpaste segment of the H&BA market, said one insider, except for the way manufacturers are marketing things.

The latest trend is tartar controllers. Tartar is the chemical and mineral buildup that usually forms on adult teeth.

With its introduction of Crest Tartar Control brand toothpaste, Procter & Gamble was the first to take the tartar control route. P&G's move served to boost its lead in the toothpaste market, which it led by only 1.5 percent over Colgate's 28 percent. It now has 16.7 percent more share of the market.

Since its introduction last June, Crest Tartar Control has captured an

estimated 14 percent of the total toothpaste market.

"Anytime something new, improved, better tasting or having a new quality is introduced, it fuels consumer brushing," said one buyer.

One area of dental care often overlooked but of significant value, said NAVRESSO's Hoffman, is toothbrushes. Hoffman said the angled brush is still popular. Sales in the Navy alone account for about half a million dollars annually.

The Hair Manipulation Boom

Today's hairstyles have had two major effects on the haircare market: there's been a rebirth of hairspray and a boom in temporary coloring products.

Haircare buyers for NAVRESSO and AAFES agree the biggest trend to hit the haircare market in awhile is the temporary hair coloring kits companies such as Clairol and Vidal Sassoon are marketing.

The colors are vibrant, said AAFES' Kimple and the purchaser is generally young, said NAVRESSO's Hoffman.

Temporary colors "allow a woman to have the Madonna look on Saturday evening and the business look on Monday morning," Hoffman said.

"The colors are trendy and temporary," he added, and guessed that the market could well exceed the \$100 million mark before the end of 1986.

There has also been the resurgence of hairsprays and hair gels as a result of today's styles, said Hoffman. And though mousses are still popular, he adds, the market has literally been saturated with market entries. As a result, there are many brands dropping out.

market report

Ethnic Market: "More Educated And Aware of What's Available"

The ethnic health and beauty aid business is becoming recognized by the military as one of the fastest growing categories in the total H&BA market.

Lafayette Jones is executive director of the American Health and Beauty Aids Institute. It represents makers of ethnic H&BA products. Jones said that last year's sales showed a seven-percent growth in the ethnic H&BA market.

The military accounts for much of that growth, he said, because blacks account for 20 percent of the military's population.

"Now is the time for the military to recognize the ethnic market, especially the black consumer," Jones told MILITARY MARKET in a telephone interview.

Blacks are also "more educated and aware of what's available," he said. "This influences their purchasing habits."

Ethnic H&BA plays another important role in the military market he said: they "hold the morale of the troops together."

In March, the Army and Air Force Exchange Service, which already has an extensive brand name ethnic H&BA program, introduced four AAFES brand private label haircare products to the ethnic sections of its exchanges.

The products are a hairfood, a moisturizer, oil sheen and activator. Anna Ransom, AAFES' ethnic H&BA buyer, told MILITARY MARKET.

Although the items have been on the market only a few months, Ransom said "from all indications, sales have been good." But, she added, "we can't be sure if it is just the initial impact or not."

In the overall ethnic H&BA market, haircare products account for about 41 percent of sales, AHBAT's Jones said.

AAFES' Ransom said the exchange agency is touting the new private label brands for their eco-

nomical value. The AAFES brand oil, moisturizer and activator are all available in a 16 ounce size, instead of the standard 8, 10 and 12 ounces that national brands use.

The hairfood product is sold in the standard 4½ ounce size.

AAFES maintains a separate ethnic H&BA section away from the regular H&BA items, said Ransom, so ethnic consumers can find those products more easily.

"AAFES' decision to separate the ethnic items from the others is an intelligent one, because retailers have done this for years," Jones said. "Ethnic shoppers have been trained by the retail world to shop for these items in this fashion."

Ransom also said AAFES wants to expand its ethnic cosmetic section to include some lesser-priced items now entering the market.

In 1985, AAFES sold \$13,323,000 in ethnic haircare and beauty products, said Ransom.

Although "ethnic" primarily refers to blacks, AHBAT's Jones explained that these types of cosmetics are designed to meet the needs of a variety of skin tones.

Black skin varies in color, with about 33 different tones, he said. These range from blue-black to ivory white. As a result, he said, many product users are of Spanish, Indian, oriental and sometimes even white descent.

Ethnic H&BA products are also available in some Navy exchanges, said Glenn Hoffman, NAVRESSO H&BA buyer. Whether a store carries ethnic H&BA, Hoffman said, depends on whether the exchange region feels there is product demand.

NAVRESSO carries about 50 haircare items for those stores that do stock these products.

Like AAFES, NAVRESSO merchandises ethnic H&BA in a section separate from regular H&BA items, said Hoffman. — A.R.

When it comes to choosing shampoos and conditioners, said Kimple, price and value are becoming important factors. Kimple told MILITARY MARKET the trend he sees is a shrinking medium-priced market, while sales and popularity have increased in the lower-priced and premium-priced products.

Particularly popular, Kimple said, are those lower-priced hair products that have strong brand identification, like Gillette's White Rain.

Manufactures of premium-priced products are leaning towards fragrance as a selling point for shampoos and conditioners, said Hoffman. "Anytime a manufacturer has a new, improved or better smelling hair product, people will try it to look better," Hoffman said.

Care for Younger-Looking Skin

Although most major cosmetic industry trade publications report the latest trend in skin care to be products that promote younger-looking faces, NAVRESSO's Hoffman said he doesn't think that trend has hit the military yet.

Lotions to reduce wrinkles and lines and help replenish older and weathered skins are becoming more popular, he agrees, but he said he thinks these potentially high-profit items won't come into full swing for another year.

Advertising Age magazine reported that 1984 figures for facial creams, powders and sun-care lotions totaled \$2.3 billion. That was an increase of 9.5 percent from 1983.

In the skin toners, fade creams and astringent segment, growth rates for the same time were 7.3 percent in a \$1.1 billion market.

Trends that remain popular at the cosmetics shelf, said Hoffman, include body glitters, cheek glosses and eye makeup.

Also, some cosmetics makers are turning to packaging as a way to increase sales. Coty, for example, a division of Pfizer, just introduced its Color Focus Kit. The kit contains three different eyeshadows color-coordinated with a blush and lipstick.

Other changes, such as creams and cleansers in pump bottles and new sizes, are designed for convenience — something today's consumer regards heavily while making purchasing decisions. MM

Last year, Navy exchanges were served by 117 suppliers, who did over \$1 million worth of business with the system.

The sales are for NAVRESSO's fiscal year ending January 1986. Amounts are in millions of dollars.

Ethan Allen Inc.	\$1.59	International Playtex	1.58
American Brands Inc.	7.47	Jockey International	1.18
Anheuser Busch	5.58	C. Lloyd Johnson Co.	3.20
Apple Computer Inc.	6.56	S.C. Johnson & Son Inc.	1.14
ARA Services (Magazine and Book Div.) San Diego	1.69	Johnson & Johnson	1.72
ARA Services (Magazine and Book Div.) Norfolk	2.55	John K. Kealy Co.	2.95
Elizabeth Arden Inc.	2.07	Kimberly Clark Corp.	1.12
The Arrow Co.	1.76	Leggs Products Inc.	1.10
Balfour Inc.	1.34	Lever Brothers Co.	1.34
BASF Systems	1.62	Liggett & Meyers Tobacco Co.	5.20
Baskin Robbins Inc.	1.05	B. Lippman	2.05
Beverages Foods & Service Industries Inc.	2.92	Jonathan Logan	1.03
Black & Decker Housewares Group	2.57	LondonTown Corp.	1.01
Black & Decker	1.28	Lorillard Corp.	5.09
The Bose Corp.	1.78	Malden Form Inc.	1.46
E.J. Brach & Sons	1.55	James River Dixie Marathon	1.05
Brigade Brands Ltd.	1.44	Mattel Inc.	1.88
Brown & Williamson Tobacco Corp.	6.71	Mercury Luggage Mfg. Co.	1.16
Campus Sweater & Sportswear Co.	1.42	Miller Brewing Co.	3.02
Canon U.S.A. Inc.	2.28	Minolta Corp.	1.75
Caslo Inc.	1.02	M&M Mars	2.26
The Catalogue Group Inc.	1.90	Monarch Crown Corp. (Clairol)	2.01
Chevron Chemical Co.	1.10	Philip Morris Inc.	28.78
Concept Systems Inc.	1.49	Nabisco Brands Inc.	1.02
Coca Cola Export Corp.	2.57	Nike Inc.	3.57
Colgate Palmolive Co.	1.15	Old Dominion Tobacco Co. Inc.	1.30
Coast Distributing Co.	1.48	Pauling & Co.	2.08
Coleco Industries Inc.	1.28	Pauling Overseas	1.03
Conoco Inc.	5.73	Pendleton Woolen Mills	1.58
Creighton Inc.	6.17	Pepsi Cola Bottling Co. (San Diego)	1.13
Davis Clothing Co.	2.69	Pioneer Electronics	2.19
Dexter Shoe Co.	1.13	Polaroid Corp.	2.13
Diversified Products Corp.	1.08	Procter and Gamble	8.76
Eastman Kodak Co.	10.02	RCA Sales Corp.	3.95
Encore Entertainment	1.94	R.J. Reynolds Tobacco Co.	23.88
Eurpac East	5.38	Revlon Inc.	4.39
Eurpac West	3.23	Rubbermaid Inc.	1.19
Exxon Co. USA	4.44	Samsonite	1.55
Farah Manufacturing Co.	1.57	Sansul Electronics Corp.	1.23
Fieldcrest Mills	1.64	Sanyo Electric Inc.	1.31
Firestone Tire & Rubber Co.	1.74	Seagoing Uniform Corp.	3.48
Fisher Price Toys Inc.	1.32	Sharp Electronics Corp.	4.88
Fisher Corp.	2.81	S&K Sales Co.	2.09
Forget Me Not Cards	1.91	Southern Apparel Co.	2.73
Frito Lay Inc.	3.06	N.V. Spring Inc.	1.18
General Electric Co.	1.72	Levi Strauss	7.35
Gillette Co.	3.44	Sycamore Mfg. Co.	1.22
Goodyear Tire & Rubber Co.	1.64	System Development Corp.	1.47
Haggar Co.	1.99	Timex Corp.	1.83
Robert Hale & Associates	1.78	Union Carbide Corp.	2.37
Hallmark Cards Inc.	5.27	Vanguard Industries West	1.87
Hanes Corp. (Hosiery Div.)	2.14	Vanguard Military Equipment Corp.	2.99
Hanes Corp. (Knitwear Div.), Pasadena	1.19	Velva Sheen Mfg. Co.	1.14
Hanes Corp., Charlotte	2.03	Warner Lambert Co.	1.13
Health Tex Inc.	2.49	Whirlpool Corp.	5.14
Hershey Chocolate Co.	1.39	Williams Carter Co.	1.15
Hoffman Beverage Co.	1.11	Wolverine World Wide (Bates Military Div.)	6.82
The Hoover Co.	1.43	Zenith Electronics Corp.	1.58
Huffy Corp.	1.91		

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COMMISSARIES

		FEBRUARY			YEAR TO DATE		
		CY'86	CY'85	% CHANGE	CY'86	CY'85	% CHANGE
AIR FORCE	CONUS	\$141,731	\$137,662	2.96	\$307,300	\$292,618	5.02
	OVERSEAS	28,216	28,097	0.42	56,377	58,671	-3.91
	TOTAL	169,947	165,759	2.53	363,677	351,289	3.53
ARMY	CONUS	97,965	96,390	1.63	207,690	202,860	2.38
	OVERSEAS	31,920	29,085	9.75	66,255	60,795	8.98
	TOTAL	129,885	125,475	3.51	273,945	263,655	3.90
NAVY	CONUS	58,921	59,644	-1.21	118,427	115,368	2.65
	OVERSEAS	6,596	6,414	2.84	13,094	12,972	0.94
	TOTAL	65,517	66,058	-0.82	131,521	128,340	2.48
MARINE CORPS	CONUS	12,039	12,114	-0.62	26,684	26,457	0.86
	OVERSEAS	267	249	7.23	520	485	7.22
	TOTAL	12,306	12,363	-0.46	27,204	26,942	0.97
COAST GUARD	CONUS	236	274	-13.87	497	565	-12.04
	OVERSEAS	286	284	0.70	640	607	5.44
	TOTAL	522	558	-6.45	1,137	1,172	-2.99
ALL COMMISSARIES	CONUS	\$310,892	\$306,084	1.57	\$660,598	\$637,868	3.56
	OVERSEAS	\$67,285	\$64,129	4.92	\$136,886	\$133,530	2.51
	TOTAL	\$378,177	\$370,213	2.15	\$797,484	\$771,398	3.38
GROCERY STORES	U.S. ¹	\$20,688	\$19,640	5.34	\$43,437	\$40,780	6.52

EXCHANGES

		FEBRUARY			YEAR TO DATE		
		CY'86	CY'85	% CHANGE	CY'86	CY'85	% CHANGE
AAFES	CONUS	\$224,149	\$209,886	6.80	\$428,839	\$395,672	8.38
	OVERSEAS	157,280	142,926	10.04	306,107	278,314	9.99
	TOTAL	381,429	352,812	8.11	734,946	673,986	9.04
NAVY	CONUS ²	78,182	82,433	-5.16	136,932	144,783	-5.42
	OVERSEAS ²	32,602	33,348	-2.24	60,311	63,906	-5.63
	TOTAL ²	110,784	115,781	-4.32	197,243	208,689	-5.48
MARINE CORPS*	CONUS	28,630	27,918	2.55	49,245	48,776	0.96
	OVERSEAS	4,586	4,557	0.64	8,910	8,901	0.10
	TOTAL	33,216	32,475	2.28	58,155	57,677	0.83
COAST GUARD	CONUS ³	6,230	6,171	0.96	11,683	11,309	3.31
	OVERSEAS ³	464	476	-2.52	870	920	-5.43
	TOTAL ³	6,694	6,647	0.71	12,553	12,229	2.65
MAIL ORDER	CONUS ⁴	1,541	1,325	16.30	2,904	2,380	22.02
	OVERSEAS ⁴	3,205	3,667	-12.60	6,840	6,530	4.75
	TOTAL ⁴	4,746	4,992	-4.93	9,744	8,910	9.36
ALL EXCHANGES	CONUS	\$338,732	\$327,733	3.36	\$629,603	\$602,920	4.43
	OVERSEAS	\$198,137	\$184,974	7.12	\$383,038	\$358,571	6.82
	TOTAL	\$536,869	\$512,707	4.71	\$1,012,641	\$961,491	5.32
DEPARTMENT STORES	U.S. ¹	\$8,058	\$7,769	3.72	\$16,012	\$15,398	3.99

* Marine Corps exchange sales reflect the fact that there were 31 sales days in February 1985 and 33 sales days in February 1986.

1) SOURCE: U.S. Department of Commerce. 2) Does not include sales of ship stores. 3) MM estimate, based on official data. 4) Includes consolidated sales for all services, including Coast Guard. NOTE: Individual figures may not add to totals because of rounding. All sales are expressed in millions (add 000), except grocery stores and department stores, which are in billions. Commissary sales include appropriate surcharges; ex change sales include concession volume.